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## **Menu 11: Sales Analysis**

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## Menu 11 Sales Analysis

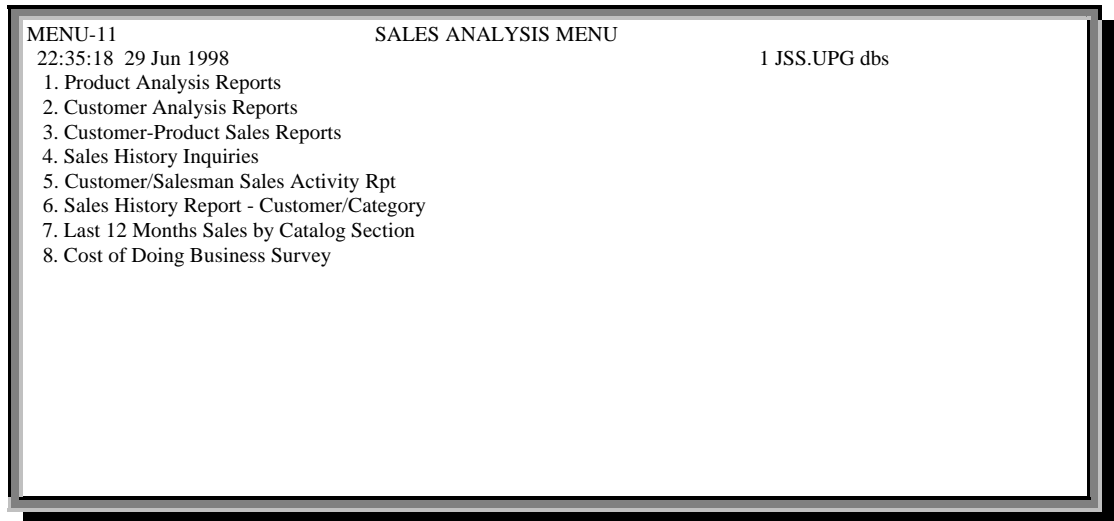


Figure 11-1. Main menu of Sales Analysis

### Purpose

Use these sales analysis reports to list sales data in various combinations using various criteria such as products and customers, salespersons by customer and by product, and products by salesperson.

### 11.1 Product Analysis Reports

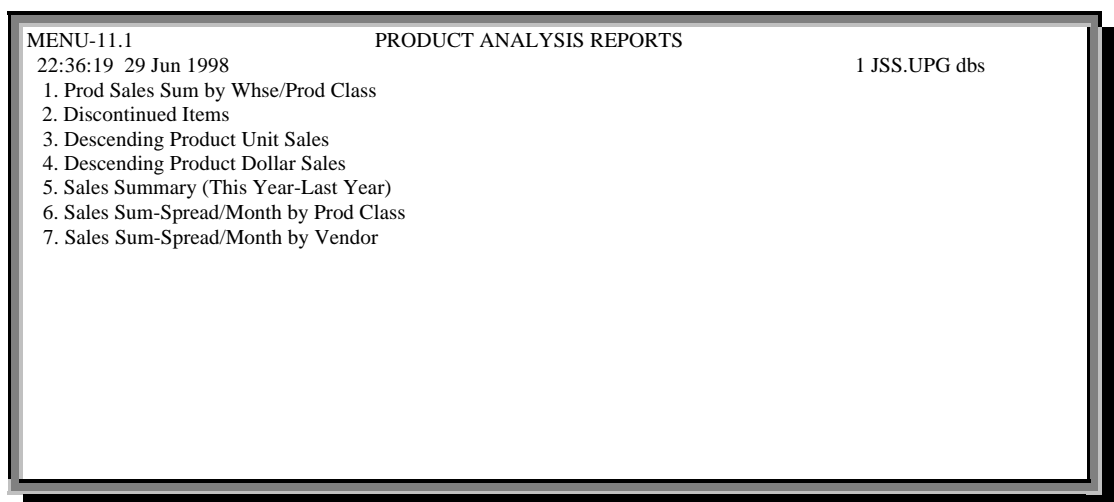


Figure 11-2. Product Analysis Reports

**11.1.1 Product Sales Summary by Warehouse/Product Class**

List product sales information by month-to-date or year-to-date. Select report by company, product class, beginning and ending product numbers, and year of sales.

- a. Select printer destination.
- b. Choose a company number or **Enter** for all.
- c. Enter a product class or **Enter** for all.
- d. Enter a beginning product number for your "FROM" selection, or **Enter** for all.
- e. Choose either sales from this year (1) or last year (2). Report processes immediately.

ALL WAREHOUSES		**** PRODUCT SALES ****				PAGE: 1	
		UNITS	SALESS	PROFIT	PCT	UNITS	SALESS
484 011 S88-458	561 D81 MOTOR	0	0	0.0	0	0	0
485 011 S91-100	H356 MOTOR	1	827	391	47.3	0	0
486 011 S91-222	I117 D82 MOTOR	0	0	0.0	0	0	0

**Figure 11-3. Product Sales Summary**

**11.1.2 Discontinued Items**

List stock status information for products flagged as "discontinued."

- a. Select printer destination.
- b. Choose a company number or **Enter** for all.
- c. Enter a product class or **Enter** for all.
- d. Enter a beginning product number for your "FROM" selection, or **Enter** for all.
- e. To list only items with quantity on hand type 'y,' otherwise type 'n.'

03 Jul 1998		DISCONTINUED ITEM REPORT				PAGE 1		
ALL WAREHOUSES:								
P/C	PRODUCT#.....	ITEM.DESC.....	PM.VEND	CAT-PG	ON .. HAND	IN.PICK VEND ON ORD	BACKORD QTY SOLD. 12 MONTHS YTD	SALESS..VALUE YTD
001	B10-186	F-770 D80 TIMER	C488	D80	101		1	
001	B11-297	R062 D80 RLAY/OVRLD	C532	D80	100			541.400
001	B11-470	GC105 D80 COLD CNTRL	A391	D80	10			47.500
001	B11-473	GC110 D80 COLD CNTRL	A391	D80	10			49.500
001	B11-497	GC139 D80 COLD CNTRL	A391	D80	10			68.000
001	B11-506	GC148 D80 COLD CNTRL	A391	D80	10			64.000
001	B11-509	GC155 D80 COLD CNTRL	A391	D80	10			64.500
001	B11-577	V34200 D81 SUB B12-058	A475	SUB	10			111.100
001	B11-579	V34202 D81 SUB B12-060	A475	SUB	10			146.000
001	B11-824	TA-4 D80 ALARM SYSTM	C532	D80	100			9538.000
001	B11-825	TA-4R D80 ALARM REC	C532	D80	100			4769.000

**Figure 11-4. Discontinued Item Report**

### 11.1.3 Descending Product Unit Sales

List month-to-date and year-to-date product sales information by descending unit sales. Report also lists units and dollars sold, and profit dollars and profit percentages.

- Select a printer.
- Select a warehouse number or **Enter** for all.
- Enter a product class or **Enter** for all.
- Enter a beginning product number for your "FROM" selection, or **Enter** for all. Calculates unit sales

WHSE: ALL WAREHOUSES		PRODUCT CLASS / PRODUCT ANALYSIS AS OF 04/01/98				PAGE 1											
PC: 001 REPORTS - REFRIGERATION & A/C		MONTH UNITS		PCT		YTD UNITS		PCT		MONTH SALES\$		PCT		YTD SALES\$		PCT	
PRODUCT CODE	U/M	DESCRIPTION	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE
B10-102	EA	SLD13-6SV DRYER	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B10-105	EA	SLD54-11SV DRYER	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B10-106	EA	SLD54-13SV DRYER	0	0	0	1	10	90-	0	0	0	0	0	0	0	573	100-
B10-360	EA	TEST PART	0	0	0	29	66	56-	0	0	0	347	624	44-			
B11-360	EA	TEST	0	0	0	4	0	0	0	0	0	19	0	0			

**Figure 11-5. Product Class/Product Analysis**

### 11.1.4 Descending Product Dollar Sales

List month-to-date and year-to-date product sales information by descending dollar sales. Report lists units and dollars sold, and profit amount and profit percentages.

- Select a printer.
- Select a warehouse number or **Enter** for all.
- Enter a product class or **Enter** for all.
- Enter a beginning product number for your "FROM" selection, or **Enter** for all.

PAGE 1		PRODUCT DESCENDING SALES DOLLARS YTD ANALYSIS					03 Jul 1998					
WHSE : 001 JOHNSTONE SUPPLY SEATTLE												
***** MONTH TO DATE *****			***** YEAR TO DATE *****									
LINE	PRODUCT#	PRODUCT NAME	UNITS	SALESS	PROFIT	G/P%	%TOT	UNITS	SALESS	PROFIT	G/P%	%TOT
1	B10-360	A30-261 REFR. CONTROL	1444	1242834		1.15		90	7244	2452	33.84	1.55
11	B10-106	SLD54-13SV-HH DRYER	146	7127	1347	18.89	1.13	146	7127	1347	18.89	1.53
12	B10-016	GL7 THERMOSTAT KIT	90	5242	2095	39.96	0.83	90	5242	2095	39.96	1.12
13	H93-022	DV-142N 5CFM VAC PUMP	10	3743	3182	85.00	0.59	10	3743	3182	85.00	0.80
14	H25-014	ULD-100 LEAK DETECTOR	25	3682	1109	30.11	0.58	25	3682	1109	30.11	0.79
15	B10-222	68Z3204 TEF2 VALVE	90	3618	2330	64.39	0.57	90	3618	2330	64.39	0.77
16	B12-012	P170LB-1C CONTROL	49	3393	1079	31.81	0.53	49	3393	1079	31.81	0.73

**Figure 11-6. Product Descending Sales Dollars**

### 11.1.5 Sales Summary (This Year/Last Year)

List product sales information for specific months, comparing sales this year to last year's, and calculate the difference in percentage.

- Select a printer.
- Enter as-of-date (MM/DD/YY); be sure to include a slash (/).
- Enter a warehouse number or **Enter** for all.
- Enter a product class or **Enter** for all.
- Enter a beginning product number for your "FROM" selection, or **Enter** for all.

WHSE: ALL WAREHOUSES			PRODUCT CLASS / PRODUCT ANALYSIS AS OF 04/01/98						PAGE 1		
PC: 001 REPORTS - REFRIGERATION & A/C											
PRODUCT CODE	U/M	DESCRIPTION	MONTH UNITS		YTD UNITS		MONTH SALESS		YTD SALESS		PCT
			THIS YR	LAST YR	THIS YR	LAST YR	THIS YR	LAST YR	THIS YR	LAST YR	
B10-086	EA	PSG-2 SIGHT GLASS	0	0	0	0	0	0	0	0	0
B10-102	EA	SLD13-6SV DRYER	0	0	0	0	0	0	0	0	0
B10-105	EA	SLD54-11SV DRYER	0	0	0	0	0	0	0	0	0
B10-106	EA	SLD54-13SV DRYER	0	0	1	10	90-	0	0	0	573
B10-360	EA	TEST PART	0	0	29	66	56-	0	0	347	624
B11-360	EA	TEST	0	0	4	0	0	0	0	19	0
B92-100	EA	700604-07-0500 D72 COMP	0	0	0	0	0	0	0	0	0

**Figure 11-7. Product Class/Product Analysis**

### 11.1.6 Sales Sum-Spread/Month by Prod Class

List product sales information for specific months, comparing sales this year to last year's, and calculate the percentage difference. This report sorts by product class.

- Select a printer.
- Enter an as-of date (MM/DD/YY).
- Choose a fiscal month.
- Choose to report by units ('u') or dollars ('d').
- Enter a warehouse number or **Enter** for all.

- f. Enter a product class or **Enter** for all.
- g. Enter a beginning product number for your "FROM" selection, or **Enter** for all.
- h. Choose to report this year's sales (1) or last year's (2).
- i. Enter product class or **Enter** for all.
- j. Enter a beginning product number for your "FROM" selection, or **Enter** for all.

WHSE: ALL WAREHOUSES		PRODUCT CLASS / PRODUCT SPREAD ANALYSIS AS OF 10/13/98												PAGE 1		
PC: 001 REPORTS - REFRIGERATION & A/C		***MONTHLY SALES												YEAR TO DATE		PCTPRODUCT CODE
U/M	DESCRIPTION	1	2	3	4	5	6	7	8	9	10	11	12	THIS YR	LAST YR	CGE
B02	EA PILOT BURNER	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B10-176	EA A-771 D79 TIMER	0	0	10	0	0	0	0	0	0	0	0	0	10	0	0
B11-055	EA SYT6 D80 RELAY	0	0	0	0	0	0	0	2	0	0	0	0	2	7	71-
B12-005	EA V34209 D81 SUB B12-065	0	0	0	25	0	0	0	2	0	0	0	0	27	2	1250
B80-959	EA 1-42A D75 PUMP	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B80-960	EA 1-42 D75 PUMP	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B80-964	EA 2E-NDVR D75 PUMP	0	0	0	0	0	0	0	0	0	0	0	0	0	1	100-
B80-967	EA 1-MD D75 PUMP	0	0	0	0	0	0	0	0	0	0	0	0	0	1	100-
B92-094	EA 700599-07-0510 D72 COM	0	0	0	0	3	0	0	0	0	0	0	0	3	0	0
C99-111	EA THIS IS A GOOD TEST	0	0	0	10	0	0	0	0	0	0	0	0	10	0	0
G21-741	EA GV-034 D81 COIL	0	0	0	0	0	0	0	0	0	32	0	0	0	70	100-
G21-751	EA GV-054 D81 COIL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
G21-837	EA F332-5PK SERVICE FORMS	0	0	0	0	0	0	0	0	0	0	0	0	0	5	100-
G22-055	EA EP543 D80 SUB G22-053	0	0	0	0	0	0	0	0	0	0	0	0	0	1	100-
**PROD CLASS:003 'G' - ELECTRICAL PR		0	0	0	0	0	0	0	0	0	32	0	0	0	76	100-

**Figure 11-8. Product Class/Product Spread Analysis**

### 11.1.7 Sales Sum-Spread/Month by Vendor

Similar to the preceding two menus, this one lists product sales information for specific months, comparing sales this year to last year's and calculating the percentage difference. This report sorts by vendor.

- a. Select a printer.
- b. Enter an as-of date (MM/DD/YY).
- c. Choose a fiscal month.
- d. Choose to report by units ('u') or dollars ('d').
- e. Enter a warehouse number or **Enter** for all.
- f. Enter a vendor number or **Enter** for all.
- g. Enter a beginning product number for your "FROM" selection, or **Enter** for all.
- h. Choose to report this year's sales (1) or last year's (2).



WHSE: 001 JOHNSTONE SUPPLY DBS Test		VENDOR / PRODUCT SPREAD ANALYSIS ASOF 01/15/98												PAGE 1			
VEND: 001 JOHNSTONE SUPPLY, INC.		****MONTHLY SALES UNITS THROUGH CURRENT YEAR MONTH 02****												YEAR TO DATE		PCT	
PRODUCT	U/M	DESCRIPTION	1	2	3	4	5	6	7	8	9	10	11	12	THIS YR	LAST YR	CGE
B10-360	EA	TEST PART	0	0	0	0											
B92-100	EA	700604-07-0500 D72 COMP	0	0	0	0	0	00	0	0	0	0	0	0	0	0	
**A541			0	0			00		0	0					0	0	0
			0	0					0	0	0	0			0	0	0

**Figure 11-9. Vendor/Product Spread Analysis**

## 11.2 Customer Analysis Reports

MENU-11.2	CUSTOMER ANALYSIS REPORTS	1 JSS.UPG dbs
21:05:45 03 Jul 1998		
1. Customer Activity Analysis		
2. Customer Activity Analysis (No GP)		
3. Customer Gross Profit Report By Slsm		
5. Inactive Customer Report		
6. Descending Customer Dollar Sales		
7. Descending Customer Gross Profit		
8. Comparative Sales by Customer		
9. Comparative Sales by Salesman		
10. Gross Profit by Customer		

**Figure 11-10. Customer Analysis Reports**

### 11.2.1 Customer Activity Analysis

Compare customer sales activities for this year and last year on a month-to-date and year-to-date basis. This report lists profit comparisons including dollars and percents.

- a. Select a printer.
- b. Enter an as-of-date (MM/DD/YY).
- c. Enter a fiscal month.
- d. Choose a customer number or **Enter** for more selection criteria (e-g).
- e. Enter a company number or **Enter** for all.
- f. Enter a customer class or **Enter** for all.
- g. Enter a salesperson number or **Enter** for all.

CO 01 JOHNSTONE SUPPLY		CUSTOMER ACTIVITY ANALYSIS AS OF 01/01/98										PAGE 1		
SLSM 000 SALESMAN ZERO														
CUST NO	CUSTOMER NAME	LAST ORD DATE	NO ORDERS		MONTH SALES		PCT CGE	YTD SALES		PCT CGE	YTD GROSS PROFIT		PCT GP	
			MTD	YTD	THIS YR	LAST YR		THIS YR	LAST YR		THIS YR	LAST YR		
123	Jeff's JSS.UPG Tester	04/23/98	150	150	100	0	0	364	0	0	218	0	0	60
SLSM 000 TOTALS:			150	150	100	0	0	364	0	0	218	0	0	60
REPORT TOTALS:			150	150	100	0	0	364	0	0	218	0	0	60

**Figure 11-11. Customer Activity Analysis**

### 11.2.2 Customer Activity Analysis (no GP)

Compare customer sales activities for this year and last year on a month-to-date and year-to-date basis. Select report by company, customer class, salesperson, and specific customer. This report does not compare gross profit.

- Select a printer.
- Enter an as-of-date (MM/DD/YY).
- Enter a fiscal month.
- Choose a customer number or **Enter** for more selection criteria (e-g).
- Enter a company number or **Enter** for all.
- Enter a customer class or **Enter** for all.
- Enter a salesperson number or **Enter** for all.

CO 01 Database Business Systems		CUSTOMER ACTIVITY ANALYSIS AS OF 12/01/97										PAGE 1	
SLSM 000 NO SALESMAN													
CUST NO	CUSTOMER NAME	LAST ORD DATE	NO ORDERS		MONTH SALES		PCT CGE	YTD SALES		PCT CGE			
			MTD	YTD	THIS YR	LAST YR		THIS YR	LAST YR				
BAD		04/29/93	2		0	0	0	0	0	0	0	0	0
TAMMY	12345 AMBAUM BLVD			-3	-3	0	0	0	0	0	0	0	0
9661980	ALL CLIMATE REFRIGERATION	07/25/97	2		0	0	0	0	0	0	0	0	0
TAX	BILLY BOB	05/14/96	7		0	0	0	97591	0	0	0	0	0
100026	BOBS APPLICANCE PARTS		0		0	0	0	0	0	0	0	0	0
COD	C.O.D. NON-TAXABLE	05/23/96	2		0	0	0	97	0	0	0	0	0
CASH1	CASH CUSTOMER	11/09/95	2		0	0	0	0	0	0	0	0	0
TSA	OSCAR'S GARBAGE CAN	06/10/98	67		0	0	0	61708	0	0	0	0	0
TVW	TRESE	06/25/98	466		0	0	0	0	87527	30053882	0	0	0
100													
SLSM 005 TOTALS:			533	0	0	0	0	149235	30053882	100			

**Figure 11-12. Customer Activity Analysis (no GP)**

### 11.2.3 Customer Gross Profit Report by Salesman

List customer profit analysis by salesperson. Report lists sales statistics month-to-date and year-to-date including sales, returns, and net and gross profit.

- Select a printer.
- Choose a customer number or **Enter** for more selection criteria (c-f).
- Enter a company number or **Enter** for all.
- Enter a customer class or **Enter** for all.

- e. Enter a salesperson number or **Enter** for all.
- f. Choose to report this year's sales (1) or last year's (2).

GROSS PROFIT BY CUSTOMER - BY SALESMAN						DATE 03 Jul 1998		PAGE 1		
ALL COMPANIES: SLS- 000 SALESMAN ZERO										
***** MONTH TO DATE *****										
***** LAST YEAR *****										
CUST#	CUSTOMER NAME	SALES\$	NET SALES	PROFIT	G/P%	SALES\$	NET SALES	PROFIT	G/P%	
ABC	ABC	0	0.0	0.00	0					
JLD	DOBYNS ENTERPRISES	15,119	-1,194	13,925	4,613	33.1	0.00	0.00	0.00	0
JLD	DOBYNS ENTERPRISES						0	0.0	0.00	0
200	DOWNTOWN AIR CONDITIONIN						0	0.0	0.00	0
200	DOWNTOWN AIR CONDITIONIN						0	0.0	0.00	0
200	DOWNTOWN AIR CONDITIONIN						0	0.0	0.00	0
200	DOWNTOWN AIR CONDITIONIN						0	0.0	0.00	0
200	DOWNTOWN AIR CONDITIONIN						0	0.0	0.00	0
200	DOWNTOWN AIR CONDITIONIN						0	0.0	0.00	0
ELLY	ELLY MAE						0	0.0	0.00	0
ELLY	ELLY MAE						0	0.0	0.00	0
100	GREAT CITY SUPPLY						0	0.0		

**Figure 11-13. Gross Profit by Customer-By Salesman**

### 11.2.5 Inactive Customer Report

Select customer records with no activity since the last activity date entered. The report lists general sales analysis showing month-to-date and year-to-date statistics.

- a. Enter the last activity date (MM/DD/YY). The report select customers with no activity since this last date entered.
- b. Enter a fiscal month.
- c. Enter a company number or **Enter** for all.
- d. Enter a customer class or **Enter** for all.
- e. Enter a salesperson number or **Enter** for all.

CO ALL COMPANIES		INACTIVE CUSTOMER REPORT AS OF 12/01/97										PAGE 1		
SLSM 000 NO SALESMAN														
CUST NO	CUSTOMER NAME	LAST ORD DATE	NO ORDERS MTD	YTD	MONTH SALES			YTD SALES			YTD GROSS PROFIT		PCT CGE	PCT GP
					THIS YR	LAST YR	PCT CGE	THIS YR	LAST YR	PCT CGE	THIS YR	LAST YR		
100023	PERNELL SERVICES		0	0	0	0	0	0	0	0	0	0	0	0
100026	BOBS APPLICANCE PARTS		0	0	0	0	0	0	0	0	0	0	0	0
L1780B	LA COUNTY ISD	06/23/94	1	0	0	0	0	0	0	0	0	0	0	0
5000	VISA / MASTERCARD CHARGE	07/05/94	2	0	0	0	0	0	0	0	0	0	0	0
1234	FRED'S SUDS	07/22/94	2	0	0	0	0	0	0	0	0	0	0	0
555	CUSTOMER MERGED INTO	12/09/92	32	0	0	0	0	0	0	0	0	0	0	0
TAK	KRAUSE AUTO BROKERS	03/17/93	96	0	0	0	0	0	0	0	0	0	0	0
10192	NEW MEXICO STATE UNIV	05/22/95	1	0	0	0	0	0	173	100	0	53	100	0
SRJW	NEW - SATTELLITE (RJW)	10/05/95	5	0	0	0	0	0	610	100	0	186	100	0
CASH1	CASH CUSTOMER	11/09/95	2	0	0	0	0	0	0	0	0	0	0	0
SLSM 000 TOTALS:			142	0	0	0	0	0	783	100	0	239	100	0

**Figure 11-14. Inactive Customer Report**

**11.2.6 Descending Customer Dollar Sales**

List customer sales statistics with month-to-date and year-to-date sales and profits, or last year's sales and profits, by descending year-to-date sales.

- Select a printer.
- Enter a company number or **Enter** for all.
- Enter a customer class or **Enter** for all.
- Enter a salesperson number or **Enter** for all.
- Select a year option: (1) sales this year with month-to-date, or (2) sales last year.

CUSTOMER DESCENDING SALES DOLLARS YTD ANALYSIS 07/03/98								PAGE 1			
COMP :01 JOHNSTONE SUPPLY											
***** MONTH TO DATE *****											
****	*****	YEAR TO DATE	*****								
LINE	CUST#	CUSTOMER NAME	NET SALES	PROFIT	G/P%	% TOTAL	NET SALES	PROFIT	G/P%	% TOTAL	
1	123	Jeff's JSS.UPG Tester	18782.03	8436.76	50.24	43.45	16791.44	8436.76	50.24	38.84	
2	JLD	DOBYNS ENTERPRISES	15119.02	4613.14	33.13	34.97	13924.66	4613.14	33.13	32.21	
3	SMM	STEVE MOELLER	1111.10	0.00	0.00	2.57	1111.10	0.00	0.00	2.57	
4	TAK	TROYS TEST	567.61	77.29	13.62	1.31	567.61	77.29	13.62	1.31	
5	1515	NEW TEST CUSTOMER	100.00	44.97	44.97	0.23	100.00	44.97	44.97	0.23	
000 SALESMAN TOTAL =			35679.76	13172.16	40.54	82.53	32494.81	13172.16	44.94	75.16	
6	1234	1234 TEST	11571.21	3972.69	37.24	26.76	10666.47	3972.69	37.24	24.67	
7	CASH	CASH NON-TAXABLE	64.95	42.96	66.14	0.15	64.95	42.96	66.14	0.15	
001 SALESMAN TOTAL =			11636.16	4015.65	37.42	26.91	10731.42	4015.65	40.86	24.82	

**Figure 11-15. Customer Descending Sales Dollars**

**11.2.7 Descending Customer Gross Profit**

List customer sales statistics by descending year-to-date gross profit dollars, or last year's sales and profits.

- Select a printer.
- Enter a company number or **Enter** for all.
- Enter a customer class or **Enter** for all.
- Enter a salesperson number or **Enter** for all.
- Select a year option: (1) sales this year with month-to-date, or (2) sales last year.

CUSTOMER DESCENDING GROSS PROFIT DOLLARS LAST YEAR						DATE 05 Jul 1998	PAGE 1	
COMP: ALL COMPANIES								
CUST#	CUSTOMER NAME	*** LAST YEAR *** SLS LAST YR	***** PROFIT	YEAR TO DATE SALES\$	***** RETURNS	NET SALES	PROFIT	G/P%
ROB	ROBERT CONRAD	529252.18 5	13778.33	446.81	0.00	446.81	291.05	65.14
1234	1234'S NAME	20723.52	12868.09	27.10	0.0027.10	15.93	58.78	
RICH	RICH'S SPECIAL SUPPLIES	2907.99	866.12	15.46	0.0015.46	2.73	17.66	
		552883.69	527512.54	489.37	0.00	489.37	309.71	
[405] 3 items listed out of 318 items.								

**Figure 11-16. Customer Descending Gross Profit Dollars**

### 11.2.8 Comparative Sales by Customer

List comparative sales statistics by period for the current and previous years. The screen version allows you to review statistics for an individual customer instantly; the printed report lists similar information.

- Enter your operator initials.
- Choose to print to screen ('s') or printer ('r').
- Enter six-digit customer number or maximum 13-character name.
- Confirm the customer name or number.
- Enter a company number or **Enter** for all.

01 ===== COMPARATIVE SALES BY CUSTOMER =====					
123	1234 TEST			001 SALESMAN ONE	
*** CURRENT ***			*** LAST YEAR ***		
JAN	0.00		JAN	0.00	
FEB	4,252.64		FEB	0.00	
MAR	328.10		MAR	668.90	
QTR TOT:	4,580.74		QTR TOT:	668.90	
APR	0.00		APR	1,553.38	
MAY	0.00		MAY	0.00	
JUN	2,039.09		JUN	0.00	
QTR TOT:	2,039.09		QTR TOT:	1,553.38	
JUL	0.00		JUL	0.00	
AUG	0.00		AUG	0.00	
SEP	0.00		SEP	0.00	
QTR TOT:	0.00		QTR TOT:	0.00	
OCT	120.00		OCT	155.50	HIT <RTN>
NOV	1,548.86		NOV	0.00	WHEN DONE
DEC	0.00		DEC	0.00	
QTR TOT:	1,668.86	YTD: 8,288.69	QTR TOT:	155.50	YTD: 2,377.78

**Figure 11-17. Comparative Sales by Customer**

### 11.2.9 Comparative Sales by Salesman

This report gives you a comparative sales analysis by salesperson and customer, showing sales totals by period for the current and previous years. The report totals by company and by salesperson, and breaks for each salesperson.

- Select a printer.
- Enter your operator initials.
- Enter a company number or **Enter** for all.
- Enter a customer class or **Enter** for all.
- Enter a salesperson number or **Enter** for all.
- Compare years: (1) this year versus last year, or (2) last year versus two years ago.

REPORT NO 4		JOHNSTONE SUPPLY		TIME: 21:24:57		DATE: 07/03/98	
SLSM: 000 SALESMAN ZERO		COMPARATIVE SALES BY SALESMAN					
PAGE: 1							
***** C U R R E N T Y E A R *****				***** L A S T Y E A R *****			
123	Jeff's JSS.UPG Tester	SLMN: 000 SALESMAN ZERO					
JAN:	FEB: 264.03	MAR:	QTR:				
APR:	MAY:	JUN:	QTR:	APR:	MAY:	JUN:	QTR:
JUL:	AUG:	SEP:	QTR:	JUL:	AUG:	SEP:	QTR:
OCT:	NOV:	DEC:	QTR:	OCT:	NOV:	DEC:	QTR:
			YTD: 16,791.44				YTD: 0.00
** TOTAL FOR SALESMAN: SALESMAN ZERO **							
JAN:	FEB: 364.03	MAR: 157.55	QTR: 521.58	JAN:	FEB:	MAR: 1,476.71	QTR: 1,476.71
APR:	MAY:	JUN: 15,084.59	QTR: 15,084.59	APR: 15.00	MAY:	JUN:	QTR: 15.00
JUL:	AUG:	SEP:	QTR:	JUL:	AUG:	SEP:	QTR:
OCT: 1,036.48	NOV: 14,066.58	DEC:	QTR: 15,103.06	OCT: 194.75	NOV:	DEC:	QTR: 194.75
			YTD: 30,709.23				YTD: 1,686.46
*****							
*** GRAND TOTALS ***							
JAN:	FEB: 4,616.67	MAR: 443.15	QTR: 5,059.82	JAN:	FEB:	MAR: 2,145.61	QTR: 2,145.61
APR:	MAY:	JUN: 17,123.68	QTR: 17,123.68	APR: 1,568.38	MAY:	JUN:	QTR: 1,568.38
JUL:	AUG:	SEP:	QTR:	JUL:	AUG:	SEP:	QTR:
OCT: 1,156.48	NOV: 15,665.39	DEC:	QTR: 16,821.87	OCT: 290.25	NOV:	DEC:	QTR: 290.25
			YTD: 39,005.37				YTD: 4,004.24

**Figure 11-18. Comparative Sales by Salesman**

### 11.2.10 Gross Profit by Customer

Print a gross profit analysis report for a selected period in the current year, including the year-to-date totals and the totals for the previous year.

- Choose a printer destination.
- Enter a company number or **Enter** for all.
- Enter customer number or **Enter** for all.
- Enter your sales number.
- Enter a fiscal period to report (YYMM).
- Choose to print addresses: 'y'es or 'n'o.

```

20:51:13 13 Oct 1998  GROSS PROFIT REPORT FOR JOHNSTONE SUPPLY  OPTIONS: ALL, ALL, 9806  STORE: ALL COMPANIES  PAGE  1
CUST.  CUSTOMER NAME          :<----- PERIOD 9806 ----->:<----- YEAR TO DATE ----->:<--LAST YEAR-->
NO.      CL TP: SALES  COST          G.P. % : SALES  COST  G.P. % : SALES  %
CASH  CASH NON-TAXABLE      0b 01  0.00   0.00          0.00 0.0  15.00  12.00   3.00  20.0  0.00  0.0
***
PORTLAND, OR 99999
CASH NON-TAXABLE
MARA  MARA COHN              0b   2039.09  1045.85          993.24 48.7  7533.93  4842.78  2691.15 35.7  2377.78 29.5
700 N. HAYDEN ISLAND DR
SUITE 250
JUST A TEST
PORTLAND, OR 97217-0001
283-2513

                GREAT CUSTOMER
-----
GRAND TOTAL          2039.09                993.24  7548.93                2694.15  2377.78
                1045.85                48.7  4854.78                35.7  29.5

```

Figure 11-19. Gross Profit by Customer

### 11.3 Customer Product Sales Reports

```

MENU-11.3          CUSTOMER-PRODUCT SALES ANALYSIS          1 JSS.UPG dbs
22:37:47 29 Jun 1998
1. By Co, Slsm, Cust, Prod (Sales.4)
1A. Spread Version (Sales.4)
2. By Product, Customer (Sales.4)
3. Salesman Sales Summary (Sales.5)
4. Salesman - Product Class (Sales.5)
5. Slsm-Prod Clss Sprd Report (Sales.5)
6. Sales by Slsm/Cust/ProdCls (Sales.6)
7. Sales Summary Co-Prod Clss (Sales.7)

```

Figure 11-20. Customer-Product Sales Reports

#### 11.3.1 By Company, Salesman, Customer, Product

List product sales information for a specified month, comparing sales this year to sales for the same period last year. This report shows month-to-date and year-to-date figures, percent changes, each product that a customer has purchased, and a total for the customer and for the salesperson.

- Choose a printer destination.
- Enter an as-of-date (MM/DD/YY).
- Enter a fiscal period to report (YYMM).
- Enter a customer number or **Enter** for more selection criteria (e-h).
- Enter a company number or **Enter** for all.
- Enter a customer class or **Enter** for all.
- Enter a salesperson number or **Enter** for all.

- h. Enter a beginning product number for your "FROM" selection, or **Enter** for all.

CO: 01 JOHNSTONE SUPPLY			SALESMAN/ CUSTOMER / PRODUCT ANALYSIS AS OF 05/01/98						PAGE 1									
SLSM: 001 SALESMAN ONE			MONTH UNITS		PCT		YTD UNITS		PCT		MONTH SALES		PCT		YTD SALES		PCT	
PRODUCT CODE	U/M	DESCRIPTION	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	
B10-016	EA	GL7 THERMOSTAT KIT	0															
B10-016	EA	GL7 THERMOSTAT KIT	0	0	0	29	0	0	0	0	0	0	0	0	1447	0	0	
**CUST:1234		1234 TEST	0	0	0	29	0	0	0	0	0	0	0	0	1447	0	0	
*****																		

**Figure 11-21. Salesman/Customer/Product Analysis**

### 11.3.1A Spread Version

Print a spread analysis by salesperson, showing either units or dollars sold for each product for each month. The report breaks down and totals each new customer and gives a grand total for each salesperson

- Enter an as-of-date.
- Enter a fiscal month (MM).
- Choose a report by units ('u') or dollars ('d').
- Select by salesperson ('s') or customer ('c').
- If by salesperson, enter a salesperson number. If by customer, enter that number.

SALESMAN: 001 SALESMAN ONE			CUSTOMER / PRODUCT SPREAD ANALYSIS AS OF 04/01/98														
PAGE 1																	
COMPANY: ALL COMPANIES			**** MONTHLY SALES DOLLARS THROUGH CURRENT YEAR MONTH 05 ****														
YEAR TO DATE	PCT		1	2	3	4	5	6	7	8	9	10	11	12	THIS YR	LAST YR	CGE
PRODUCT	U/M	DESCRIPTION															
B11-360	EA	TEST	0	0	5	0	0	0	0	0	0	0	0	0	50	0	0
NSTEST	EA	TEST PART	0	0	10	0	0	0	0	0	0	0	0	0	10	0	0
CUST#:	CASH	CASH NON-TAXABLE	0	15	0	0	0	0	0	0	0	0	0	0	65	0	0
*****																	
CUST#:	1234	1234 TEST															
B10-016	EA	GL7 THERMOSTAT KIT	0	1280	0	0	0	0	0	0	0	0	0	0	1447	0	0
B10-017	EA	ML45 THERMOSTAT	0	59	0	0	0	0	0	0	0	0	0	0	63	0	0
B10-019	EA	ML55 THERMOSTAT	0	4	0	0	0	0	0	0	0	0	0	0	4	0	0
B10-020	EA	ML60 THERMOSTAT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B10-036	EA	90-63 RELAY	0	20	0	0	0	0	0	0	0	0	0	0	20	0	0
FINAL TOTALS:			0	1012	0	0	0	0	0	0	0	0	0	0	9990	1000	899
*****				4253	537	0	0	0	0	0	0	0	0	9990	1000	899	

**Figure 11-22. Customer/Product Spread Analysis**



### 11.3.2 By Product, Customer

List comparison of month-to-date and year-to-date sales figures for a specified period. The report lists, by product, each customer that purchased that product and a total for the period.

- Select a printer destination.
- Enter an as-of date.
- Enter a fiscal month.
- Enter a company number or **Enter** for all.
- Enter a product class or **Enter** for all.
- Enter a beginning product number for your "FROM" selection, or **Enter** for all.

CO:01 JOHNSTONE SUPPLY		PRODUCT / CUSTOMER ANALYSIS AS OF 01/01/98										PAGE 1	
CUSTOMER#	CUSTOMER NAME	MONTH SALES			PCT			YTD SALES			PCT		
		THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE
PRODUCT# U/M DESCRIPTION													
EA GL7 THERMOSTAT KIT													
-----													
1234	1234 TEST	0	0	0	26	0	0	0	0	0	1280	0	0
PRODUCT# U/M DESCRIPTION													
B10-016 EA GL7 THERMOSTAT KIT													
-----													
123	Jeff's JSS.UPG Tester	0	0	0	0	0	0	0	0	0	0	0	0
PRODUCT# U/M DESCRIPTION													
B10-017 EA ML45 THERMOSTAT													
-----													
PRODUCT# U/M DESCRIPTION													
B10-019 EA ML55 THERMOSTAT													
-----													

**Figure 11-23. Product/Customer Analysis**

### 11.3.3 Salesman Sales Summary

List sales dollar totals and profit margins by salesperson for a specified period. The ending month is listed separately, and a year-to-date total is given for beginning to ending periods, inclusive.

- Select a printer.
- Enter** to proceed with the process.
- Enter a salesperson number or **Enter** for all.
- Enter a beginning fiscal month to report.
- Enter an ending fiscal month.

SALES BY SALESMAN (CUMULATIVE)    DATE: 07/03/98    PAGE: 1						
TIME: 21:35:48						
S A L E S M A N	***** MONTH 06 *****			***** YEAR TO DATE (03-06)*****		
	SALE\$	MARGIN	GP %	SALE\$	MARGIN	GP %
000 SALESMAN ZERO	15,084.59	4,965.78	32.9	17,057.40	5,429.19	31.8
001 SALESMAN ONE	2,039.09	993.13	48.7	3,196.11	1,382.50	43.3
GRAND TOTALS:	17,123.68	5,958.91	34.8	20,253.51	6,811.69	33.6

**Figure 11-24. Sales by Salesman (cumulative)**

### 11.3.4 Salesman-Product Class

Print a comparative sales analysis of total units and dollars sold for each product class by salesperson. List month-to-date and year-to-date sales figures, and total for each salesperson.

- Enter as-of-date.
- Enter fiscal month.
- Enter a product class or **Enter** for all.
- Enter salesperson number or **Enter** for all.
- Enter company number or **Enter** for all.

CO: ALL COMPANIES		SALESMAN/ PRODUCT CLASS ANALYSIS				AS OF 12/01/97		PAGE 1									
SLSM: 000 SALESMAN ZERO		MONTH UNITS		PCT		YTD UNITS		PCT		MONTH SALES\$		PCT		YTD SALES\$		PCT	
P/C	DESCRIPTION	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	
001	'B' - REFRIGERATION & A/C	0															
119	TUBING	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
201	TEST INSTRUMENTS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
318	THERMOSTATIC EXP VALVE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
322	REFRIG CONTROLS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
402	BELT DRIVE MOTORS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
403	DIRECT DRIVE MOTORS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
404	CONDENSOR FAN MOTORS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
407	APPLIANCE MOTORS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
999	MISC GOODS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	FINAL TOTALS:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

**Figure 11-25. Salesman/Product Class Analysis**

### 11.3.5 Salesman-Product Class Spread Report

List monthly sales by salesperson by product class. The report includes monthly sales and gross profit figures for each product class the salesperson sold, with a year-to-date total for each. At the salesperson break, the report totals the month columns, and gives a year-to-date grand total for the salesperson. The same is done at the company break.

- a. **Enter** to proceed.
- b. Enter company number or **Enter** for all.
- c. Enter salesperson number or **Enter** for all.
- d. Choose to report this year's sales (1) or last year's (2).

WHSE: ALL WAREHOUSES		PRODUCT CLASS / PRODUCT SPREAD ANALYSIS AS OF 10/01/98												PAGE 1						
PC: 001 REPORTS - REFRIGERATION & A/C		****MONTHLY SALES DOLLARS THROUGH CURRENT YEAR MONTH 04****																		
YEAR TO DATE	PCT	PRODUCT CODE	U/M	DESCRIPTION	1	2	3	4	5	6	7	8	9	10	11	12	THIS YR	LAST YR	CGE	
		L36-137	EA	30E02-1 D81 SWITCH	0	0	0	0	0	0	0	0	0	0	33-	0	0	0	60	100-
**PROD CLASS:007 'L' - HEATING					0	0	0	0	0	0	0	0	0	0	33-	0	0	0	60	100-
		S87-414	EA	K2483 D82 DRIVE MOTOR	0	0	264	0	0	0	0	0	0	0	0	0	264	0	0	
		S87-536	EA	MA206 D78 MOTOR	0	0	0	0	0	0	0	0	0	0	0	0	0	136	100-	
**PROD CLASS:011 'S' - MOTORS & ACCE					0	264	0	0	0	0	0	0	0	0	0	0	264	136	95	
		P50-029	EA	3-11013 BELT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		P50-047	EA	95405 BELT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		P51-064	EA	AP64 BELT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		P52-045	EA	BP45 BELT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		P52-092	EA	BP92 BELT	0	0	70	0	0	0	0	0	0	0	0	0	70	0	0	
**PROD CLASS:100 BELTS					0	70	0	0	0	0	0	0	0	0	0	0	70	0	0	
		0B81-108	EA	458732 CH414	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		B81-115	EA	GH319 DEFROST HEATER	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		B81-116	EA	GH320 DEFROST HEATER	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

Figure 11-26. Product Class/Product Spread Analysis

### 11.3.6 Sales by Salesman/Customer/Product Class

Print a comparative sales analysis of total units and dollars sold for each product class by salesperson and by customer. The report lists month-to-date and year-to-date sales figures, and gives a total for each customer and a grand total for each salesperson.

- a. Select a printer.
- b. Enter an as-of date.
- c. Enter a fiscal month.
- d. Enter a product class or **Enter** for all.
- e. Enter salesperson number or **Enter** for all.
- f. Enter company number or **Enter** for all.

CO: ALL COMPANIES		SALESMAN/ CUSTOMER / PRODUCT CLASS ANALYSIS AS OF 04/15/98												PAGE 1	
SLSM: 000 SALESMAN ZERO		MONTH UNITS		PCT	YTD UNITS		PCT	MONTH SALES		PCT	YTD SALES		PCT		
P/C	DESCRIPTION	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE	THIS YR	LAST YR	CGE		
001	'B' - REFRIGERATION & A/C	0													
CUST#: JLD DOBYNS ENTERPRISES															
001	'B' - REFRIGERATION & A/C	16	0	0	16	0	0	14649	0	0	14649	0	0		
402	BELT DRIVE MOTORS	0	0	0	0	0	0	0	0	0	0	0	0		
999	MISC GOODS	6	0	0	6	0	0	230	0	0	230	0	0		
**CUST:JLD DOBYNS ENTERPRISES		22	0	0	22	0	0	14879	0	0	14879	0	0		
*****															

Figure 11-27. Salesman/Customer/Product Class Analysis

**11.3.7 Sales Summary Company-Product Class**

Print a year-to-date sales summary by product class for one or all companies. The report lists units sold, sales dollars and cost dollars, and totals the columns for each company.

- Enter starting fiscal month (MM).
- Enter ending fiscal month.
- Enter company number or **Enter** for all.
- Choose the year option: (1) this year or (2) last year.

SALES BY COMPANY BY PRODUCT CLASS							
DATE: 07/03/98 PAGE: 1							
CO #: ALL COMPANIES							
TIME: 21:40:19							
***** MONTH 05 *****							
***** YEAR TO DATE (01-05)*****							
P/C	DESCRIPTION	UNITS	SALESS	COSTS\$	UNITS	SALESS	COSTS\$
119	TUBING	0	0.00	0.00	14	250.73	151.53
201	TEST INSTRUMENTS	0	0.00	0.00	4	569.55	345.15
211	WELDING EQUIPMENT	0	0.00	0.00	3	127.10	70.45
317	DRYERS	0	0.00	0.00	0	-9.58	-5.65
318	THERMOSTATIC EXP VALVE	0	0.00	0.00	0	0.00	0.00
319	REFRIG COMPONENTS	0	0.00	0.00	6	60.23	36.04
322	REFRIG CONTROLS	0	0.00	0.00	0	0.00	0.00
324	REFRIGERANT	0	0.00	0.00	1	60.45	55.07
327	REFRIGERATION TOOLS	0	0.00	0.00	1	97.95	77.60
328	COMPRESSOR CONTROLS	0	0.00	0.00	2	40.90	12.73
401	GENERAL PURPOSE MTRS	0	0.00	0.00	11	1,405.44	937.43
402	BELT DRIVE MOTORS	0	0.00	0.00	12	499.90	125.40
403	DIRECT DRIVE MOTORS	0	0.00	0.00	0	0.00	0.00
404	CONDENSOR FAN MOTORS	0	0.00	0.00	0	0.00	0.00
405	DBL SHAFT MOTORS	0	0.00	0.00	0	0.00	0.00
407	APPLIANCE MOTORS	0	0.00	0.00	0	0.00	0.00
413	ELECTRICAL SUPPLIES	0	0.00	0.00	11	21.64	20.20
999	MISC GOODS	0	0.00	0.00	1	1,000.00	800.00
GRAND TOTALS:		0	0.00	0.00	344	7,746.50	5,277.36

**Figure 11-28. Sales by Company by Product Class**

## 11.4 Sales History Inquiries

MENU-11.4	SALES HISTORY INQUIRY SELECTOR	1 JSS.UPG dbs
22:38:27 29 Jun 1998		
1. Product Sales Inquiry (Sales.2)		
2. Customer Sales Inquiry (Sales.3)		
3. Customer/Product Sales Inq (Sales.4)		
4. Slsm/Prod Class Sales Inq (Sales.5)		
4A.Rebuild Sales.5 from Sales.4		
5. Slsm/Cust/Prod Class Sales (Sales.6)		
6. Product Class Sales Inq (Sales.7)		
7. Prod Class Sales Inq-Graph (Sales.7)		
9. Total Sales Inq by Slsmn (Sales.5)		
10. Total Sales Inquiry by Company		
11. New Inq by Co - from EOD/EOM Reports		

Figure 11-29. Sales History Inquiries

### 11.4.1 Product Sales Inquiry

View a general inquiry of product sales including sales quantity, sales dollars, gross profit percentage, and dollars comparing current and previous year.

- Enter a warehouse number or **Enter** for all.
- Enter a product number.
- Type '*end*' for next product or '*end*' again for another warehouse number. To exit '*end*' again.

PRODUCT SALES INQUIRY								
WAREHOUSE: 001 Database Business Systems								
PRODUCT : b10-120 083S DRYER								
	QTY	QTY	SALES-\$	SALES-\$	G/P-\$	G/P-\$	G/P-%	G/P-%
	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR
JAN	22	39	8	19.49				
FEB	10	99	48	48.37				
MAR	7	8	92	66	54	24	58.60	36.09
APR	13	49	18	36.60				
MAY	10	69	90	573	39	216	43.66	37.70
JUN	40	267	85	31.84				
JUL	7	74	38	51.56				
AUG	15	19	97	54	24	-10	25.08	-18.73
SEP	17	48	17	36.10				
OCT	3	17	19	164	9	74	47.61	45.13
NOV	129	9	1372	1	662	-9	48.25	-861.81
DEC								
TOTAL	233	162	1978	1126	917	380	46.36	33.73
HIT RETURN TO CONTINUE.								

Figure 11-30. Product Sales Inquiry

**11.4.2 Customer Sales Inquiry**

Similar to the previous menu except this is for customer rather than product sales.

- Enter a company number or **Enter** for all.
- Enter a customer number, and then confirm.
- Type **'end'** to exit.

CO# ALL<CR> FOR ALL CUSTOMER SALES INQUIRY							
CUSTOMER : 123		Jeff's Tester					
SALES-\$	SALES-\$	CREDITS	CREDITS	G/P-\$	G/P-\$	G/P-%	G/P-%
THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR
JAN							
FEB							
MAR	12539		6798	54.21			
APR							
MAY	590		-37739	6392.24			
JUN							
JUL							
AUG							
SEP							
OCT							
NOV							
DEC							
TOTAL	13129		-30940	-235.66			
HIT RETURN TO CONTINUE.							

**Figure 11-31. Customer Sales Inquiry**

**11.4.3 Customer/Product Sales Inquiry**

A combination of the previous two screens, this inquiry retrieves totals of specific customer and specific product sales. It includes sales dollars, quantities, gross profit dollars, and percentages comparing current year to previous year.

- Enter a company number or **Enter** for all.
- Enter a customer number and then confirm.
- Enter a product number.
- Type **'end'** for next product; enter **'end'** again to exit.

```

CO# ALL<CR> FOR ALL  CUSTOMER/PRODUCT SALES INQUIRY

CUSTOMER : 123      Jeff's Tester
PRODUCT  : b10-120  083S DRYER

      QTY  QTY      SALES-$ SALES-$  G/P-$    G/P-$    G/P-%  G/P-%
      THIS-YR LAST-YR  THIS-YR LAST-YR  THIS-YR  LAST-YR  THIS-YR  LAST-YR
      -----
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC

TOTAL      0  0
HIT RETURN TO CONTINUE.

```

**Figure 11-32. Customer/Product Sales Inquiry****11.4.4 Salesman/Product Class Sales Inquiry**

View a general inquiry of salesperson and product class sales totals.

- Enter a company number or **Enter** for all.
- Enter a salesperson number.
- Enter a product class.
- Type **'end'** for next product class; enter **'end'** again to exit.

```

CO# ALL<CR> FOR ALL  SALESMAN/PRODUCT CLASS SALES INQUIRY

SALESMAN : 001 TEST
PRODUCT CLASS : 001 'B' - REFRIGERATION & A/C

      QTY  QTY      SALES-$ SALES-$  G/P-$    G/P-$    G/P-%  G/P-%
      THIS-YR LAST-YR  THIS-YR LAST-YR  THIS-YR  LAST-YR  THIS-YR  LAST-YR
      -----
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV      1      8      3      37.50
DEC

TOTAL      1  0  8      3      37.50
HIT RETURN TO CONTINUE.

```

**Figure 11-33. Salesman/Product Class Inquiry**

**11.4.4A Rebuild Sales.5 from Sales.4**

Clear and rebuild the Sales.5 file from the Sales.4. Run this program after making any changes to the salesperson's data.



**This program could take several hours. Call Database to run this automatically during your next day-end.**

- One step: type 'y\*\*\*' to begin the process.

**11.4.5 Salesman/Customer/Product Class Sales**

List sales totals by specific salesperson, customer, and product class.

- a. Enter a company number or **Enter** for all.
- b. Enter a salesperson number.
- c. Enter a customer number and then confirm.
- d. Type in the product class.
- e. Type '*end*' for next product class; enter '*end*' again for another customer number; '*end*' a third time to exit.

```

CO# ALL<CR> FOR ALL  SALESMAN/CUSTOMER/PRODUCT CLASS SALES INQUIRY

SALESMAN : 002 ANOTHER JOE
CUSTOMER : 123      Jeff's Tester
PRODUCT CLASS : 001 'B' - REFRIGERATION & A/C
  QTY   QTY   SALES-$ SALES-$ G/P-$   G/P-$   G/P-%   G/P-%
  THIS-YR LAST-YR  THIS-YR LAST-YR THIS-YR LAST-YR THIS-YR LAST-YR
  -----
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC

TOTAL      0      0
HIT RETURN TO CONTINUE.

```

**Figure 11-34. Salesman/Customer/Product Class Sales Inquiry**

**11.4.6 Product Class Sales Inquiry**

List summary of product class sales totals for current and previous years.

- a. Enter a company number or **Enter** for all.
- b. Enter a product class.
- c. Type '*end*' to exit.



```

CO# ALL<CR> FOR ALL  PRODUCT CLASS SALES INQUIRY
PRODUCT CLASS : 003 'G' - ELECTRICAL PRODUCTS

```

	QTY THIS-YR	QTY LAST-YR	SALES-\$ THIS-YR	SALES-\$ LAST-YR	G/P-\$ THIS-YR	G/P-\$ LAST-YR	G/P-% THIS-YR	G/P-% LAST-YR
JAN	1		8		3		35.56	
FEB								
MAR	10		268		115		43.02	
APR								
MAY								
JUN	20		324		65		20.01	
JUL								
AUG								
SEP								
OCT								
NOV	3		33		3		8.10	
DEC	1		15		15		100.00	
TOTAL	35	0	648		201		30.96	

HIT RETURN TO CONTINUE.

**Figure 11-35. Product Class Sales Inquiry**

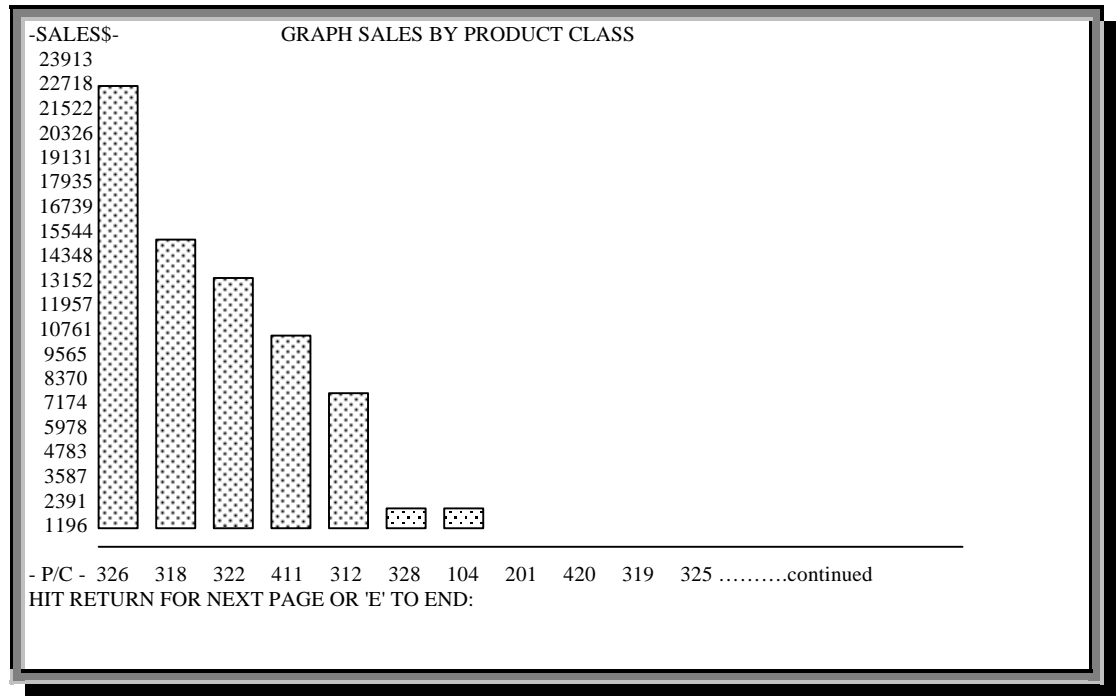
#### 11.4.7 Product Class Sales Inquiry–Graph

View a graphical representation of sales dollars or gross profits. Sort by product class, ascending or descending sales dollars, or ascending or descending gross profit dollars.



**If using a WYSE terminal to run this program, set the Enhance mode to "on." If a WYSE terminal is not used or "Enhance" is not on, the graph may not display accurately.**

- a. **Enter** to proceed.
- b. Select a sort sequence:
  1. BY PRODUCT CLASS NUMBER
  2. BY ASCENDING SALES DOLLARS
  3. BY DESCENDING SALES DOLLARS
  4. BY ASCENDING GROSS PROFIT
  5. BY DESCENDING GROSS PROFIT
- c. Choose a selection criteria:
  1. SALES DOLLARS
  2. GROSS PROFIT DOLLARS
- d. Type '*end*' to exit.



**Figure 11-36. Graph of Descending Sales by Product Class**

#### 11.4.9 Total Sales Inquiry by Salesman

View inquiry of total sales by salesperson for all customers.

- a. Select a display option: (1) for screen or (2) for printer. Select a printer destination if choosing Option 2.
- b. Enter a company number or **Enter** for all.
- c. Enter a salesperson number.
- d. Type '*end*' to exit.

TOTAL SALES INQUIRY BY SALESMAN								
CO# 01	TEST							
[404] 143 items selected out of 143 items.								
	QTY	QTY	SALES-\$	SALES-\$	G/P-\$	G/P-\$	G/P-%	G/P-%
	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR
JAN	1	0	7				3.00	
FEB	0	0						
MAR	0	0						
APR	1	0	27	16			60.41	
MAY	0	0						
JUN	0	0						
JUL	0	0						
AUG	1	10	13	80	6	29	46.98	36.41
SEP	2	0	26		12		47.75	
OCT	1	0	13		6		47.44	
NOV	3	0	12		6		48.40	
DEC	0	0						
TOTAL	9	10	97	80	47	29	47.95	36.41
HIT RETURN TO CONTINUE.								

**Figure 11-37. Total Sales Inquiry by Salesman**

#### 11.4.10 Total Sales Inquiry by Company

View inquiry of sales dollars, quantities, gross profit percentage, and profits comparing current year to previous year based on company sales.

- Enter your operator initials.
- Choose to display to screen (1) or printer (2).
- Enter a company number or **Enter** for all.
- Type **'end'** to exit.

CO# 01 <CR> FOR ALL TOTAL SALES INQUIRY								
	QTY	QTY	SALES-\$	SALES-\$	G/P-\$	G/P-\$	G/P-%	G/P-%
	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR
	-----	-----	-----	-----	-----	-----	-----	-----
JAN	58	0	6257		3203		51.19	
FEB	9	0	64	8	12.75			
MAR	2056	121	55070	5277	25457	3144	46.22	59.58
APR	219	0	8248		4116		49.90	
MAY	62	44	2877	1345	-36640	546	1273.74	40.57
JUN	1	61	5	2465	3	1295	58.11	52.53
JUL	2	4	153	7	80	3	52.35	48.85
AUG	32	41	1908	1471	688	616	36.07	41.86
SEP	43	0	1073		198	18.49		
OCT	1	64	13	2791	6	1817	47.44	65.11
NOV	193	4	11852	412	6683	134	56.38	32.41
DEC	0	0						
TOTAL	2676	339	87520	13769	3804	7555	4.34	54.87

HIT RETURN TO CONTINUE.

Figure 11-38. Total Sales Inquiry

#### 11.4.11 New Inquiry by Company – From EOD/EOM Reports

View inquiry of monthly invoice and credit memo register reconciliations from end-of-day and end-of-month report files.

- Type your operator initials.
- Enter a company number or **Enter** for all.
- Enter** to exit.

CO# ALL<CR> FOR ALL TOTAL INVOICED SALES INQUIRY								
	QTY	QTY	SALES-\$	SALES-\$	G/P-\$	G/P-\$	G/P-%	G/P-%
	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR	THIS-YR	LAST-YR
	-----	-----	-----	-----	-----	-----	-----	-----
JAN	0	26	18704	11918	63.71			
FEB								
MAR	1592	76614	35236	45.99				
APR	22	76453	20037	26.20				
MAY	46	1075	-37432	3482.79				
JUN	1	5	3	58.31				
JUL								
AUG	1	11591	6243	53.86				
SEP	0	5149	4656	90.42				
OCT								
NOV	2	20337	9298	45.71				
DEC								
TOTAL	1639	51	77694	132233	-2193	52152	-2.82	39.43

<CR> TO RETURN TO MENU

Figure 11-39. Total Invoiced Sales Inquiry

## 11.5 Customer/Salesman Sales Activity Report

Print report of sales by customer and by salesperson, comparing the current period with another.

### Step 1

**Enter** to proceed or **'end'** to return to main menu.

### Step 2

Select a printer destination.

### Step 3

Enter a company number (separate several by ';'), or **Enter** for all.

### Step 4

Enter a salesperson number (separate several by ';'), or **Enter** for all.

### Step 5

Enter a customer number (separate several by ';'), or **Enter** for all.

### Step 6

Enter a zip code (separate several by ';'), or **Enter** for all.

### Step 7

Enter prior period (YYMM) for comparison to this or last month.

SALESMAN/CUSTOMER ACTIVITY REPORT		DATE 29 Jun 1998		PAGE 1		
COMP: 01 SLS-000 NO SALESMAN						
PRIOR PERIOD: 9702						
CUST#	CUSTOMER NAME	*THIS MONTH* SALE\$\$ GP%	*LAST MONTH* SALE\$\$ GP%	*PRIOR MONTH* SALE\$\$ GP%	*THIS YEAR* SALE\$\$ GP%	*LAST YEAR* SALE\$\$ GP%
	BAD MAIL # DATE OF LAST SALE: 700 N. HAYDEN ISLAND DR PORTLAND OR 97217 123-456-7890 MAIL # DATE OF LAST SALE: 06/20/96	0.00				
	COD C.O.D. NON-TAXABLE *** PORTLAND OR 99999 MAIL # DATE OF LAST SALE: 06/20/96	96.94	89.6	0.00	0.0	0.00
	CASH CASH NON-TAXABLE *** PORTLAND OR 99999 MAIL # DATE OF LAST SALE: 03/31/98	0.00	0.0	-562.98	52.0	0.00
1234	FRED'S SUDS 700 N. HAYDEN ISLAND DR SUITE 250 PORTLAND OR 97217 503-283-2513 MAIL # DATE OF LAST SALE: 07/29/94	0.00	0.0	0.00	0.0	0.00
98765	HOMER'S PORK BROKERS 45 OINK PLAZA LITTLE ROCK AR 97220 900-976-OINK MAIL # DATE OF LAST SALE: 02/14/94	0.00	0.0	0.00	0.0	0.00
					38.19	549.0
					242.96	134.8

**Figure 11-40. Salesman/Customer Activity Report**

## 11.6 Sales History Report—Customer/Category

This is a new report that is useful for "defining" reports. With the numerous criteria available in this report, you can create custom sales reports in just about any format.

### Step 1

Select printer destination.

### Step 2

Choose to report either by company (1) or by customer (2).

### Step 3

Depending on your choice in Step 2, enter a company or customer number. Press **Enter** in either case to select all companies or customer numbers.

### Step 4

Choose a sort option:

- 1) BY PRODUCT—sorts and totals the report output by product number
- 2) BY CLASS—sorts and totals by product class by product number
- 3) BY CATEGORY—sorts and totals by product class by category by product number

### Step 5

Enter a SAVE-LIST name or **Enter** for none. Customers familiar with TCL and recall reports can create their own selected reports (use the SALES.4 file, one of the largest on the system).

### Step 6

Choose the month/year and quantity or sales dollar to list all the available sales history fields. The sort is by month starting with the most current one and going back three years. Each month has a suffix "Q" for the sales quantity information or "S" for the sales dollar information. Except for the current month, all sales information is the total sales for the month specified. Select up to 10 separate fields by line number, separating multiple entries with a semicolon (;).

COLUMN SELECTION ROUTINE FOR SALES REPORT			
Q=Quantity fields		S=Sale dollar fields	
1. JAN93Q	21. MAR93Q	41. MAY93Q	61. JUL93Q
2. JAN93S	22. MAR93S	42. MAY93S	62. JUL93S
3. JAN94Q	23. MAR94Q	43. MAY94Q	63. JUL94Q
4. JAN94S	24. MAR94S	44. MAY94S	64. JUL94S
5. JAN96Q	25. MAR96Q	45. MAY96Q	65. JUL96Q
6. JAN96S	26. MAR96S	46. MAY96S	66. JUL96S
7. JAN97Q	27. MAR97Q	47. MAY97Q	67. JUL97Q
8. JAN97S	28. MAR97S	48. MAY97S	68. JUL97S
9. JAN98Q	29. APR92Q	49. JUN92Q	69. AUG92Q
10. JAN98S	30. APR92S	50. JUN92S	70. AUG92S
11. FEB93Q	31. APR93Q	51. JUN93Q	71. AUG93Q
12. FEB93S	32. APR93S	52. JUN93S	72. AUG93S
13. FEB94Q	33. APR94Q	53. JUN94Q	73. AUG94Q
14. FEB94S	34. APR94S	54. JUN94S	74. AUG94S
15. FEB96Q	35. APR96Q	55. JUN96Q	75. AUG96Q
16. FEB96S	36. APR96S	56. JUN96S	76. AUG96S
17. FEB97Q	37. APR97Q	57. JUN97Q	77. AUG97Q
18. FEB97S	38. APR97S	58. JUN97S	78. AUG97S
19. FEB98Q	39. MAY92Q	59. JUL92Q	79. SEP92Q
20. FEB98S	40. MAY92S	60. JUL92S	80. SEP92S

Enter selection numbers separated by ';':

**Figure 11-41. Column Selection for Sales Report**

A.PROD.NO	DESCRIPTION.....	JAN93Q	JAN94S	JAN97S
B10-016	GL7 THERMOSTAT KIT			
B10-017	ML45 THERMOSTAT			
B10-019	ML55 THERMOSTAT			
B10-020	ML60 THERMOSTAT			
B10-036	90-63 RELAY			
B10-040	90-67 RELAY			
B10-041	90-68 RELAY			
B10-086	PSG-2 SIGHT GLASS			
B10-088	PSG-2S SIGHT GLASS			
B10-089	PSG-3 SIGHT GLASS			
B10-090	PSG-3MF SIGHT GLASS			
B10-091	PSG-3S SIGHT GLASS			
B10-092	PSG-4 SIGHT GLASS			
B10-093	PSG-4MF SIGHT GLASS			
B10-095	PSG-5 SIGHT GLASS			
B10-099	SLD8-5SV DRYER			
B10-100	PSG-5S SIGHT GLASS			

**Figure 11-42. Sales History Report by product**

## 11.7 Last 12 Months Sales by Catalog Section

Print report of sales based on categories defined by the Johnstone catalog.

Each section of the catalog comprises the following product classes:

**Section 1:** 100, 401, 402, 403, 404, 405, 406, 407, 408, 109, 410, 411, 412, 417  
**Section 2:** 230, 320, 418, 419, 420, 421  
**Section 3:** 300, 301, 302, 303, 304, 305, 306, 307, 308, 309, 310, 311, 329, 416, 423, 425, 426  
**Section 4:** 223, 231, 313, 315, 326, 331, 332, 335  
**Section 5:** 121, 122, 312, 314, 317, 318, 319, 321, 332, 324, 325, 327, 328, 330, 333  
**Section 6:** 106, 422  
**Section 7:** 101, 102, 103, 104, 105, 108, 109, 110, 111, 112, 113, 114, 115, 116, 124, 125, 126  
**Section 8:** 118, 119  
**Section 9:** 107, 117, 120, 226, 227, 334  
**Section 10:** 209, 210, 216, 217, 220, 221, 223, 323, 413, 414, 415  
**Section 11:** 219, 224, 225, 226, 228, 229  
**Section 12:** 202, 203, 204, 205, 206, 207, 208, 211, 212, 213, 214, 215, 218, 222  
**Section 13:** 200, 201  
**Section 14:** All other product classes not listed above.

**Step 1**

Select printer destination.

**Step 2**

Enter a company number or **Enter** for all.

22:45:42 29 Jun 1998		LAST 12 MONTHS SALES BY CATALOG SECTION REPORT FOR COMPANY 01	
SECTION SALES.12MO..			
1	0.00		
5	937.29		
7	0.00		
8	0.00		
10	0.00		
12	0.00		
13	0.00		
14	21,224.07		
	22,161.36		

**Figure 11-43. Last 12 Months Sales by catalog section**

## 11.8 Cost of Doing Business Survey

Every year Corporate sends out a survey to all customers. This menu is a tool to help with some of the answers on the survey, specifically questions 6, 7, 8, 9, and 11.

**Step 1**

Select a printer destination



**Step 2**

Run this report for each warehouse. Enter a warehouse number.

**Step 3**

Enter beginning period (YYMM).

for line #7 and line #8 - Current			
period	no.line	tot.amt.....	TOTAL
		#ORDS	
9802	174	4,775.37	76
	174	4,775.37	76

[405] 76 items listed out of 833 items.

**Figure 11-44. Cost of Doing Business survey**

**Appendix****Screen Columns**

<b>Name</b>	<b>Meaning</b>
#ORDS	Number of orders
%TOT	Total percentage
BACKORD	Backordered
CAT.PG	Catalog page number
CL TP	Class or type of product
COST \$	Total cost dollars
G/P%	Gross profit percent
IN.PICK	Quantity in pick
ITEM.DESC	Description of product
LAST ORD DATE	Last order date
MARGIN	Margin cost
ON HAND	Number on hand
P/C	Product class
PCT	Percentage
PCT CGE	Percentage change
PCT GP	Gross profit percentage
PM.VEND	Product master vendor
QTY	Quantity
QTY SOLD	Quantities sold
SALES \$	Sales dollars
UNITS	Product units (quantity)
VEND	Vendor name or number
YR	Year

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